Electronic Document Management (EDM) Pilot NEWSLETTER
May 18, 2001

Purpose

This Newsletter is to inform Health Care Service Plans (HCSP) on the status of the Electronic Document Management Project that is currently underway at the Department of Managed Health Care (DMHC). This first Newsletter will provide some background information, as well as the status of the project.

Project Background

The licensing and document management functions of DMHC are essentially paper-driven. More than 4,100 filings were submitted last year. That number translates into well over 1,000,000 pieces of paper entering the Department. In an effort to enhance its processing capabilities, and provide additional value to the HCSPs, the Department met with HCSP representatives regarding the feasibility of electronic filing. Results from those initial meetings, along with issues previously raised by HCSPs over the years, and the Department's desire to streamline its processes, provided the basis for the current project.

An Electronic Filing Pilot team, consisting of six selected Health Care Service Plans (Kaiser, Delta Dental, Blue Cross, LA Care, Landmark, and Lifeguard), DMHC staff, and vendors, will work together to ensure a proper technical fit between the HCSPs and the Department. The six HCSPs were selected based on size, diversity of Plan offerings, and a willingness to devote time to the development of an electronic filing process with the Department.

Project Timeline

The Electronic Document Management Pilot Project was originally planned with a May 2001 implementation date, in mind. However, the complexities of the project and the desire to implement a quality solution have prompted the Department to reassess the project schedule and plan for an August 1, 2001 start date. The major milestones of the project include:

Milestone	Start Date
• Feasibility and Analysis	June, 2000
• Initial Discussions with HCSPs	July, 2000
• Preliminary Requirements Development	September, 2000
• HCSP Surveys and Data Collection	January, 2001
• Pilot Design and Build	March, 2001
• Pilot Initiation (Initial 6 HCSPs)	August 1, 2001
• Pilot Evaluation	October, 2001
• Initiate Electronic Filing (All HCSPs)	January 1, 2002

Project Progress

To date, the DMHC has already completed:

- Design of the Web Portal for electronic submissions,

- Design of the Licensing electronic document repository,

- Design of the Licensing automated workflow tool,

- Initiation of fundamental PC training for internal organizational readiness for the Electronic Document Management System,

- Deployment of new desktop systems to DMHC staff to meet the minimum qualifications to support the Electronic Document Management System,

- Mailing of a Technology Survey to be completed by all HCSPs to assess their technical readiness for the eventual rollout of the electronic submission of filings,

- Development of an interactive submission of the Technology Survey via the website www.dmhc.ca.gov/hpp/survey/

- Draft of regulations to support electronically submitted Licensing filings, and

- Draft of the documentation for the Electronic Document Management System.

Upcoming Project Action Items

- Demonstrate the Web Portal to the Health Plan Pilot Group,

- Finalize development of the web portal, electronic document repository, and the internal automated workflow tool,

- Begin internal training on the electronic document repository and internal automated workflow tool,

- Begin user acceptance testing of the Electronic Document Management system,

- Continue the process to adopt new regulations, and

- Finalize the documentation for the Electronic Document Management System.

Health Plan Communication

As the Electronic Filing Pilot Project moves forward, the Department will continue to post monthly updates to the DMHC website http://www.hmohelp.ca.gov/hpp/memos/ to keep all HCSPs apprised of project progress.

Any questions regarding the project should be communicated to:

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